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National
Multiple Sclerosis
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Wisconsin
Chapter

Multiple Sclerosis Tax Check-off Program

Reporting Period January 1, 2015 – December 31, 2015

Filed December 31, 2015

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The National Multiple Sclerosis Society's Mission Statement:
*People with MS can live their best lives as we stop MS in its tracks,
restore what has been lost and end MS forever.*

BACKGROUND

Multiple sclerosis, an unpredictable, often disabling disease of the central nervous system, interrupts the flow of information within the brain, and between the brain and body. Symptoms range from numbness and tingling to blindness and paralysis. The progress, severity and specific symptoms of MS in any one person cannot yet be predicted, but advances in research and treatment are moving us closer to a world free of MS. Most people with MS are diagnosed between the ages of 20 and 50, with at least two to three times more women than men being diagnosed with the disease. MS affects more than 2.3 million worldwide.

Current estimates indicate that the average economic toll per individual affected by MS is nearly \$70,000 per year – due to lost wages and increased medical expenses, among other factors. With more than 11,300 Wisconsin children, women and men diagnosed with this disease (believed to be one of the higher prevalence rates in the nation), MS costs approximately \$786.1 million annually for the state of Wisconsin.

While more than 90 percent of people with MS have worked at some time in their lives and more than 60 percent are working at the time of diagnosis, only 20 to 30 percent remain in the workforce 10 to 15 years after diagnosis. In addition, approximately 20 to 25 percent of people with MS will need long-term care, either in an institutional facility or non-institutional setting over a prolonged time. (Long-term care refers to health care, home care, adult care, respite care, assisted living, and nursing home care.)

In December 2005, Governor Jim Doyle and members of the State Legislature, led by a bi-partisan group of legislators, created 2005 Wisconsin ACT 71 to assist those who live with MS in Wisconsin. This law established a voluntary income tax check-off on Wisconsin State income tax forms for 2006 and beyond, to fund health-related programs and services for people with MS in Wisconsin. Individuals filing Wisconsin State tax returns may now choose to allocate a portion of their tax refund, or add to their tax liability, any amount to fund health-related programs and services.

Under the provisions of ACT 71, the amount received through the income tax check-off, after administrative expenses, are to be disbursed by the National MS Society–Wisconsin Chapter, to fund health-related programs and services for people living with MS in Wisconsin. In September

2007, the National MS Society –Wisconsin Chapter, received its first appropriation of \$82,284.14, from the State of Wisconsin. Then, in September 2008, the National MS Society–Wisconsin Chapter received its second appropriation of \$85,765.75, from the State of Wisconsin. In September 2009, the National MS Society–Wisconsin Chapter received its third appropriation of \$90,147.28. In September 2010, the National MS Society–Wisconsin Chapter received its fourth appropriation of \$77,709.41. In September 2011, the National MS Society–Wisconsin Chapter received its fifth appropriation of \$75,294.95. In September 2012, the National MS Society-Wisconsin Chapter received its sixth appropriation of \$69,988.39. In September 2013, the National MS Society-Wisconsin Chapter received its seventh appropriation of \$68,955.88. In September 2014, the National MS Society-Wisconsin Chapter received its eighth appropriation of \$52,315.12. And in this past year, the National MS Society-Wisconsin Chapter received its ninth appropriation of \$68,426.56. (All appropriation totals reflect the donation for that year, less State of Wisconsin administrative fees.)

As required by Wisconsin ACT 71, this report summarizes for the State Legislature and the Governor the entities that received check-off funds and for what purposes for the 2015 calendar year.

DISBURSEMENT PROCESS

To ensure the fair disbursement of Wisconsin ACT 71 funds to residents of Wisconsin, the National MS Society–Wisconsin Chapter established a five-member advisory committee, all of whom have been diagnosed with MS. Interviews were conducted with 15 applicants selected from a pool of more than 30 interested volunteers. Criminal background and reference checks were also conducted.

The ACT 71 Advisory Committee is composed of professionals whose educational backgrounds and professional experiences complement the evaluation process for the financial aid requests. The volunteers have collective experience in all continuums of MS and are cognizant of the needs of people living with MS.

As defined by the National MS Society–Wisconsin Chapter, health-related programs and services suitable for funding include: aquatic therapy, personal counseling, respite care programs, durable medical equipment, home and auto modifications, and other expenses at the discretion of the committee and interpreted as “health-related programs.” Financial assistance from this fund is intended to help individuals maintain their independence in the community, thereby funding “health-related programs” and “needs,” not “wants,” as best defined by the National MS Society–Wisconsin Chapter, and/or interpreted by the volunteer committee.

To determine eligibility for financial aid, income guidelines were also established based upon 350 percent of the federal poverty criteria and household size.

**For incomes at 350% of federal poverty guidelines,
or other documented financial obligations**

Size of Family	2015 Gross Annual Income Poverty Guidelines at 350%
1	\$41,195
2	\$55,755
3	\$70,315
4	\$84,875
5	\$99,435
6	\$113,995
7	\$128,555
8	\$143,115
For each additional member	\$14,560

Source: <https://aspe.hhs.gov/2015-poverty-guidelines#thresholds>

APPLICATION PROCESS

To request financial aid, applicants are required to submit:

- A complete financial aid request form
- Proof of an MS diagnosis
- A prescription for the requested item or service
- A price quote or quotes from independent vendors or service providers

Applications are carefully assessed by National MS Society–Wisconsin Chapter financial assistance staff. Applications meeting the above submission requirements are forwarded to the ACT 71 Advisory Committee, which evaluates requests and determines financial assistance. The applicants' names are not disclosed to the committee to ensure confidentiality and objectivity. Applicants deemed eligible for funding are notified that their requests have been granted and checks are issued directly to the service provider or vendor.

Chapter staff also attempts to support the applicants' requests by identifying and securing donated and/or discounted services and products. These efforts augment the Wisconsin ACT 71 funds, while striving to serve as many people living with MS as possible. Augmenting financial assistance with donations and/or discounted services and goods also mobilizes the community in the spirit of cooperation and volunteerism. In the past calendar year, more than \$16,917.92 in funds, services and products have been contributed through vendor donations, discounted labor and leveraging community resources.

DISBURSEMENTS

The table provided below summarizes the Wisconsin ACT 71 Fund disbursements from January 1 through December 31, 2015.

County of Client	Disbursement	Entity	Purpose
Waukesha	\$ 216.00	Westwood Health & Fitness Center	Gym membership renewal to maintain health and strength
Milwaukee	\$ 234.00	Northside YMCA (Leveraged \$66-YMCA discount)	Gym membership renewal to maintain health and strength
Dane	\$ 1,593.29	Home Health United (Leveraged \$750 - \$250 from MS Foundation, \$500 from Friends of UW Health)	Power wheelchair to enhance client's independence
Washington	\$ 97.20	Anytime Fitness West Bend	Gym membership renewal to maintain health and strength
Brown	\$ 79.80	East Side Center YMCA	Gym membership renewal to maintain health and strength
Milwaukee	\$ 1,245.00	DME Elevators and Lifts (Leveraged \$1,750 - \$250 from MS Foundation, \$1,500 from Wheaton Franciscan)	Stairlift to enhance client's independence
Rock	\$ 128.00	Stateline Family YMCA	Gym membership renewal to maintain health and strength
Vilas	\$ 249.00	Hostel Shoppe	Trike trainer bike stand for exercise in the home to maintain health and strength
Racine	\$ 2,500.00	Neu Look LLC (Leveraged \$1,250 - \$1,000 from outside of the home family, \$250	Modifications to bathroom for safety and

		from MS Foundation, \$1,387.80 from National MS Society Stepping Stones Fund)	independence
Waukesha	\$ 2,500.00	Home Care Medical (Leveraged \$500 from MS Foundation)	Personalized wheelchair to enhance client's independence
Waukesha	\$ 120.00	Waukesha Family YMCA (Leveraged \$57-YMCA discount)	Gym membership renewal to maintain health and strength
Kenosha	\$ 189.00	Right at Home KRC	Home care during caregiver respite
Kenosha	\$ 63.00	Right at Home KRC	Home care during caregiver respite
Waukesha	\$ 432.00	Westwood Health & Fitness Center	Gym membership renewal to maintain health and strength
Milwaukee	\$ 74.00	Rite-Hite YMCA	Gym membership renewal to maintain health and strength
Milwaukee	\$ 74.00	Rite-Hite YMCA	Gym membership renewal to maintain health and strength
Milwaukee	\$ 273.00	Rite-Hite YMCA (Leveraged \$108 - YMCA discount)	Gym membership renewal to maintain health and strength
Green Lake	\$ 2,500.00	Acorn Stairlifts Inc. (Leveraged \$300 MS Foundation)	Stairlift to enhance client's independence
Brown	\$ 221.55	McMonagle Lumber	Fire proof door needed for lift to enhance clients independence

			and ensure safety
Manitowoc	\$ 2,500.00	Options for Ind. Living (Leveraged \$1,000 from Cerebral Palsy, Inc.)	Modifications to bathroom for safety and independence
Vilas	\$ 180.00	Pines Community Wellness Center	Gym membership renewal to maintain health and strength
Portage	\$ 228.15	Stevens Point YMCA (Leveraged \$25.32 - YMCA discount)	Gym membership renewal to maintain health and strength
Washington	\$ 146.00	Walmart	Air conditioner to assist client with heat sensitivity
Dane	\$ 300.00	Strege Technical (Leveraged \$250 from MS Foundation)	Batteries and charger for scooter to enhance clients independence and
Portage	\$ 179.94	Adventure 212 LLC	Gym membership renewal to maintain health and strength
Milwaukee	\$ 135.00	Rite-Hite YMCA	Gym membership renewal to maintain health and strength
Sheboygan	\$ 69.00	Planet Fitness	Gym membership renewal to maintain health and strength
Chippewa	\$ 2,295.00	National Seating and Mobility	Recline feature on client's wheelchair to enhance safety
Waukesha	\$ 246.00	Waukesha Family YMCA (Leveraged \$108 - YMCA discount)	Gym membership renewal to maintain health

			and strength
Rock	\$ 128.00	Stateline Family YMCA	Gym membership renewal to maintain health and strength
Green	\$ 2,344.00	Bridgeway Ind. Living Designs (Leveraged \$7,250 - \$7,000 from family friend, \$250 from MS Foundation)	Ceiling lift to enhance client's safety during transfer
Milwaukee	\$ 272.40	Mills Fleet Farm	Air conditioner to assist client with heat sensitivity
Sheboygan	\$ 259.00	Menards	Air conditioner to assist client with heat sensitivity
Kewaunee	\$ 2,500.00	Bridgeway Independent Living Designs (Leveraged \$250 from MS Foundation)	Stairlift to enhance client's independence
Waukesha	\$ 1,950.00	Home Care Medical (Leveraged \$500 from MS Foundation)	Electric scooter to enhance client's independence
Milwaukee	\$ 298.95	Menards	Air conditioner to assist client with heat sensitivity
Milwaukee	\$ 270.00	Rite-Hite YMCA	Gym membership renewal to maintain health and strength
Waukesha	\$ 360.00	Anytime Fitness MNF	Gym membership renewal to maintain health and strength
Waukesha	\$ 650.00	Independence First Mobility Store	Lift-chair to enhance clients safety and independence
Milwaukee	\$ 115.00	Independence First Mobility Store	Rollator walker to enhance client's independence
Milwaukee	\$ 999.00	Home Depot	Mattress to

			enhance client's safety
Milwaukee	\$ 1,045.00	Access Elevator Inc.	Home modifications to enhance client's safety and independence
Milwaukee	\$ 679.98	Home Care Medical	Home modifications to enhance client's safety and independence
Milwaukee	\$ 250.00	Access Elevator Inc.	Home modifications to enhance client's safety and independence
Outagamie	\$ 3,000.00	Bioness Inc.	Walkaide to enhance clients independence
Vilas	\$ 169.00	Walmart	Air conditioner to assist client with heat sensitivity
Chippewa	\$ 3,500.00	Access Mobility (Leveraged \$250 from the MS Foundation)	Stairlift to enhance client's independence
Milwaukee	\$ 1,500.00	Tiffany Heller	Debt counseling assistance to aid in client's wellbeing and safety
Waukesha	\$ 990.00	Extreme Exteriors	Home modifications to enhance client's safety and independence
Milwaukee	\$ 319.00	Home Depot	Air conditioner to assist client with heat sensitivity
Milwaukee	\$ 74.00	Rite-Hite YMCA	Gym membership

			renewal to maintain health and strength
Milwaukee	\$ 74.00	Rite-Hite YMCA	Gym membership renewal to maintain health and strength
Milwaukee	\$ 150.00	Northside YMCA (Leveraged \$50 - YMCA discount)	Gym membership renewal to maintain health and strength
Milwaukee	\$ 116.25	Northside YMCA (Leveraged \$39.75 - YMCA discount)	Gym membership renewal to maintain health and strength
Shawano	\$ 2,440.00	A&J Vans, Inc. (Leveraged \$450 - \$250 from MS Foundation, \$200 from Shawano County)	Scooter vehicle lift to enhance client's independence
Milwaukee	\$ 270.00	Rite-Hite YMCA	Gym membership renewal to maintain health and strength
Milwaukee	\$ 177.00	Southwest YMCA	Gym membership renewal to maintain health and strength
Brown	\$ 79.80	East Side Center YMCA	Gym membership renewal to maintain health and strength
Brown	\$ 358.00	Hanger Prosthetics & Orthotics	Walkaide cuff replacement to enhance client's independence

Portage	\$ 152.10	Steven's Point YMCA (Leveraged \$76.05 - YMCA discount)	Gym membership renewal to maintain health and strength
Manitowoc	\$ 900.25	A & J Vans	Hand controls to enhance client's driving independence and safety
Rock	\$ 560.00	Homecare Pharmacy LLC (Leveraged \$250 from MS Foundation)	Durable medical equipment to enhance client's safety and independence
Portage	\$ 750.00	Van Dreel Plumbing & Heating	Repair to water heater to aid in client's wellbeing and safety
Winnebago	\$ 2,500.00	A&J Mobility	Vehicle modification to enhance client's safety and independence
Waukesha	\$ 999.00	101 Mobility	Ramp to enhance client's safety and independence
Washington	\$ 455.48	Diana Bruckert	Repair to vehicle to enhance client's safety and independence
Milwaukee	\$ 300.00	YMCA of Metro MKE	Gym membership renewal to maintain health and strength
Rock	\$ 138.00	Stateline Family YMCA	Gym membership renewal to maintain health and strength
Milwaukee	\$ 74.00	Rite Hite YMCA	Gym membership renewal to maintain health and strength
Shawano	\$ 5,000.00	Synchrony Financial	Debt counseling assistance to aid

			in client's wellbeing and safety
Dane	\$ 208.00	Prairie Athletic Club	Gym membership renewal to maintain health and strength
Milwaukee	\$ 177.00	West Suburban YMCA	Gym membership renewal to maintain health and strength
Waupaca	\$ 246.79	Becker Rehab. Products	Durable medical equipment to enhance client's safety and independence
Milwaukee	\$ 74.00	Rite Hite YMCA	Gym membership renewal to maintain health and strength
Kenosha	\$ 2,500.00	Knueppel Health Care Services (Leveraged \$250 from the MS Foundation)	Stairlift to enhance client's safety and independence
Portage	\$ 179.94	Adventure 212 LLC	Six months gym membership to maintain health and wellness
Waukesha	\$ 360.00	Anytime Fitness	Gym membership to maintain health and wellness
TOTAL	\$59,980.87		

RESTRICTIONS FOR THE MANAGEMENT OF FUNDS

No administrative costs were deducted from these funds. To the extent feasible, all Wisconsin ACT 71 funds contributed are depleted yearly. Planning is done accordingly, after the Wisconsin Chapter is in receipt of donations for the entire calendar year.

From January to December 2015, an additional \$ 6,065.75 was disbursed to entities in Wisconsin for needs that fell outside of the ACT 71 program parameters. The above summarized methods were used to evaluate these requests, as well.

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